The Swarm Training Programme

Sales Executive

Level 4

A Sales Executive is a sales person working in either the Business to Business or Business to Consumer markets with responsibility to sell a specific product line or service. They plan their sales activities, lead the end-to-end sales interaction with the customer and manage their sales internally within their organisation. They will be responsible for retaining and growing a number of existing customer accounts, and generating new business by contacting prospective customers, qualifying opportunities and bringing the sales process to a mutually acceptable close.

The Programme

Typically, a Sales Executive will deal with a single point of contact for each sale, and will present a pre-considered value proposition. The entire sales process may be completed during a single customer 'conversation', or over a series of interactions.

A Sales Executive understands their organisation's product(s) or service(s) in detail, and is an expert at analysing customer needs and creating solutions by selecting appropriate product(s) or service(s), linking their features and benefits to the customer's requirements. A Sales Executive will develop customer relationships by establishing rapport and building trust and confidence in their own and their organisation's capabilities through demonstration of detailed product knowledge, competitor knowledge and an understanding of the market in which they operate, and by ensuring a positive customer experience.

Sales Executives operate in organisations of all sizes across all sectors and markets, including Technology, Media, Pharmaceutical, Recruitment, Fast Moving Consumer Goods, Utilities and the Automotive Sector. Typical job roles and job titles include Sales Consultant, Sales Specialist, Sales Advisor, Sales Representative, Business Development Executive, and Field Sales Executive.

Level: Level 4

Duration: 14 months of learning. 12-14 weeks of End Point Assessment Process.

Apprentices without level 2 English and Maths will need to achieve this level prior to taking the end-point assessment.

Delivery Model:

- 10+ Full Day Workshops delivered at customers site or via remote webinar.
- 14-16 One on One monthly mentoring and tutoring sessions to support in application of knowledge, skills and behaviours.

The Standard

Apprenticeship standards are based on occupational standards. An occupational standard is a short and concise document that describes what someone who is competent in the occupation normally does – 'duties', and the 'knowledge, skills and behaviours' (KSBs) required to carry out these duties competently; along with any qualifications that must be taken and alignment with professional recognition if applicable.

Knowledge

Organisational Knowledge: Understand your organisation's vision, values and capabilities, the principle goals of its overall strategy, and the specific objectives of its marketing and sales strategies. Know how to analyse your organisation's sales and marketing strategies and objectives and translate them into plans and actions for your role.

Product, Service and Sector Knowledge: Identify the features and advantages of the product(s) and/or services(s) you sell, understand how these meet customer needs, and examine how they compare to competitor's solutions. Understand the nature of your sector and the likely forthcoming changes to it. Understand the legal, regulatory and ethical frameworks relating to your sector and role.

Market Research: Understand how your market is segmented and how to target specific segments through effective product or service positioning.

Customer Knowledge: Know how to analyse the macro and micro environment of individual customers. Understand the challenges and purchasing motivations of your customers and the internal and external factors that impact their purchasing decisions. Understand expectations of what constitutes a high- quality customer experience.

Commercial and Financial Acumen: Understand the principles of finance for sales, such as profit and loss, return on investment and budgeting. Appreciate the impacts of different types of costs on the business and the drivers of profitable performance. Understand the impact of any discount or variation in terms that you may offer.

Digital Knowledge: Understands how to exploit digital technologies to aid the sales cycle.

Skills

Sales Planning and Preparation: Set effective targets using sales forecasts. Prioritise customers and activities to grow account value and maximise return-on- investment in line with your organisation's strategy. Formulate or refine customer plans and objectives. Create territory plans where appropriate.

Customer Engagement: Effectively communicate and interpret customer information exchanged through written, verbal and non-verbal communication. Develop a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships, and adapts to different customer's social preferences.

Customer Needs Analysis: Be highly skilled at effective questioning and active listening techniques to understand the customer's needs, guide the sales conversation appropriately, create mutual understanding, and build trust with customers.

Purpose and Present Solutions: Develop sales proposals and deliver them using a presentation style and technique appropriate for your customer. Present relevant products and/or services, explain features and their advantages, and clearly articulate the value and benefit of the solution for the specific customer. Use and adapt a range of techniques to draw-out and overcome common sales objections.

Negotiate: Research the customer's likely desired outcomes and negotiating stance. Develop responses to likely objections. Identify your own organisation's needs, such as minimum price and acceptable terms. Negotiate or trade variables effectively.

Closing Sales: Be attuned to verbal and non-verbal buying- signals and move to close at an appropriate point in sales conversations. Develop ethical techniques to close sales and confirm customers' purchase agreement.

Gathering Intelligence: Collect, analyse and interpret market intelligence and share it appropriately and effectively within your organisation.

Time Management: Use and adapt appropriate tools and techniques to prioritise and manage your time effectively.

Collaboration and Teamwork: Contribute effectively within a team environment. Work collaboratively with both internal and external stakeholders. Manage communications with the cross-functional team in relation to the effective delivery of your sales, such as finance and service delivery. Support continual business improvement by sharing best practice with sales team colleagues and assist the marketing team to develop new marketing collateral.

Customer Experience Management: Deliver a positive customer experience. Manage customer enquiries and issues effectively. Take proactive action to prevent and minimise customer concerns and complaints. Handle all customer interactions professionally to the customer's satisfaction.

Digital Skills: Effectively use digital tools to conduct research and target customers in line with the overall sales strategy. Able to deliver presentations and meetings using digital communication. Complete accurate records and process sales in accordance with your organisation's policies, procedures and digital CRM systems.

Behaviours

Ethics and Integrity: Present yourself as an ambassador for your employer's brand, and act in accordance with your organisation's values and code of conduct at all times. Maintain integrity in all business relationships. Challenge unethical behaviour.

Proactivity: Proactively develop new and existing customer relationships. Plan and lead sales conversations and make recommendations to support the customers' requirements. Proactively monitor the customer experience.

Self-Discipline: Demonstrate the ability to control your actions, reactions and emotions. Remain calm under pressure and be aware of your personal impact on others.

Resilience and Self-Motivation: Demonstrate the ability to maintain optimism and professionalism in the face of rejection, quickly recover from setbacks, adapt well to change, and keep going in the face of adversity. Remain highly motivated to achieve both personal and professional goals.

Continuous Professional Development: Respond positively to coaching, guidance or instruction; demonstrate awareness and ownership of your continual professional development, and actively seek out development opportunities outside of formal learning situations.

Professional Recognition

Achievement of the standard meets the eligibility requirements for Sales Certification at Level 4 with the Association of Professional Sales (APS).

Delivery Timeline

The apprenticeship delivery journey is broken down into two phases:

1. Month 1– 14: On programme training and learning (including any Maths and English requirements.
2. Month 15+ Gateway review and End Point Assessment.

Developing the Knowledge

The knowledge training is primarily delivered via classroom workshops & webinars (numbers dependent) or 121 via tuition. The content of this is based on 18 main Knowledge Outcomes that provide a depth of understanding for the skills:

Employer collaboration/involvement is key to supporting some of the above workshops/content as many will need to be bespoke to meet the employer specifics.

Skills development and Portfolio building

Evidence to demonstrate the performance of knowledge, skills and behaviours will be supported via 121 tuition and mentoring with evidence collected via our E portfolio system.

The development of the 13 skills aims will be done throughout the programme and evidence of performance will be gathered to create a showcase portfolio required by the End Point Assessment.

Reviews

Every twelve weeks the tutor will conduct a progress review with the learner and line manager to support in keeping the progress on track, identify any issues and plan the next phase of collaborative earning.

Phase 1: On Programme Training and Learning

This is the phase that consists of all the activity to developing the skills, knowledge and behaviours of the Sales Executive Standard.

The knowledge delivery is primarily delivered via classroom workshops (numbers dependent) or 121 via tuition. The content of this is based on 10 main Learning Outcomes that provide a depth of understanding for the skills:

- Self Awareness
- Organisational knowledge
- Understanding laws and ethics of selling
- Product, service and sector knowledge
- Market and Customer Knowledge
- Communication
- Commercial and financial acumen
- Digital knowledge
- Negotiation & Ethical Closing
- Time management

Employer collaboration/involvement is key to supporting some of the above workshops/content as many will need to be bespoke to meet the employer specifics.

Evidence to demonstrate the performance of knowledge, skills and behaviours will be supported via 121 tuition and evidence collected via our E portfolio system.

There are 11 skills aims are delivered in conjunction with the knowledge aims above.

- Sales planning and preparation
- Customer Engagement
- Customer Needs Analysis
- Propose and present solutions
- Negotiate

- Closing sale
- Gathering intelligence
- Time management
- Collaboration and team-work
- Customer experience management
- Digital Skills

Phase 2: Gateway and End-Point Assessment

Gateway

When all learning has been completed and evidence in the portfolio has been gathered, the next process is to conduct the Gateway review. The gateway review is when the learner, employer and provider agree the learners readiness to progress to End point Assessment.

EPA Gateway Requirements

- Completion of the off-the job learning components of the programme.
- Confirmation from the employer that the apprentice is ready. It is recommended that the training provider is consulted by the employer to inform the decision.
- Apprentices without Level 2 English and maths will need to achieve this level prior to taking end-point assessment. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths minimum requirement is Entry Level 3 and a British Sign Language qualification is an alternative to English qualifications for those whom this is their primary language.
- Completion of a portfolio of evidence (see 2.1 below). Agreement by the apprentice's employer and an independent assessor of a work-based project and a presentation to be produced during the EPA period. The agreed project start date will mark the start of the apprentice's 16-week EPA period.

The End Point Assessment Process

The EPA consists of three distinct assessment methods, listed below, and both of them must be passed for the apprentice to successfully complete the apprenticeship programme:

1. Work-Based Project.
2. Presentation, including a sales pitch, with questions and answers.
3. Professional Discussion supported by a portfolio of evidence, including; A structured Q&A session and an exploratory discussion.

The Work-Based Project

- The work-based project will be based on work the apprentice has carried out after the gateway. The EPAO will provide a list of topics for the work-based project for the apprentice to select from. The topic / title will be , designed to allow the apprentice the opportunity to evidence all of the KSBs mapped to this assessment method. The list of topics / titles must be maintained by the EPAO to prevent predictability and must allow it to contribute to the employers business.
- The topic selected must be agreed by both the EPAO and the employer before the work based project start date. A template will then be provided by the EPAO as a framework for the apprentice to use ensuring the project includes evidence of how the KSBs have been applied with real customers in a work-based context.
- The apprentice will have 10 weeks to complete the project and must submit it to the independent assessor at the end of the 10 weeks, allowing the independent assessor to mark/grade the project and to confirm that the apprentice has passed (or has passed with distinction). Please see the section on resits/ retakes for guidance on if the apprentice fails this assessment method.

The word count for the project is 5,000 words (+/- 10%) excluding annexes and references.

A typical structure for the work-based project may include:

- Objectives for sales planning and preparation.
- Organisation knowledge and it's context in selling products and/or services.
- Understanding customer(s) requirements, markets and challenges.
- Proposing and presenting solutions and option(s).
- Understanding of sales approaches and rationale in your organisation.
- Reflection on customer discussions and decisions to feedback to organisations.
- Conclusion and learning outcomes for ongoing professional development.

Presentation

The IA must be sent a copy of the presentation 10 working days in advance of the delivery by the apprentice, to allow them to prepare their questions A 10 minute (+10% at the discretion of the independent assessor in order to provide scope for an apprentice to demonstrate their full abilities) presentation, plus a 15-minute (+ 10% again at the discretion of the independent assessor), question and answer session, to include:

- A 10-minute sales pitch of the apprentice's organisation's product(s) and/or service(s). demonstrating how they positively differentiate their product(s) and/or service(s).
- A 5-minute explanation of how they prepare for a sales pitch.
- A 15-minute question and answer session around specific points that the independent assessor wishes to explore with the apprentice in relation to their pitch and pitch explanation. Prior to the presentation and questioning, the

independent assessor must have prepared 6 questions for the questioning element based on the subject matter. However, the questions may be modified to take account of the presentation evidence.

The independent assessor will provide a brief to the apprentice at the gateway to explain how the presentation should be structured. The presentation must be delivered verbally, either face-to-face or via video conference, and may also include reference to physical material or digital content. Where physical material or digital content is referenced, copies of this must be provided to the independent assessor at least 2-weeks prior to the presentation date for the independent assessor to retain.

The presentation should take place immediately prior to the professional discussion. However, as previously mentioned, this stage of end-point assessment will not take place if the apprentice has not first passed the work-based project.

Professional Discussion Supported by a Portfolio of Evidence

A professional discussion between the apprentice and the independent assessor will also be used to ensure the apprentice has met the knowledge, skills, behaviour requirements of the standard. The purpose of the professional discussion is to confirm and validate assessment of the criteria. It will be used to:

- Explore specific aspects of the apprentice's work, including how it was carried out.
- Enable the apprentice to talk through their learning on aspects of their work, allowing the assessor to question them on this.
- Provide enough evidence for the independent assessor to assess and grade the apprentice.

The professional discussion will be informed by the portfolio of evidence that will be used by the independent assessor to inform their approach to the discussion, and by the apprentice as a source of evidence to help support their responses. The professional discussion should last for 50 minutes (+10% at the discretion of the independent assessor). It will be structured as follows:

- A 25 minute question and answer session that comprises 5 structured questions, developed by the end-point assessment organisation in line with appendix 1. EPAOs must develop question banks of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they are fit for purpose.
- The apprentice will not see the structured questions before the EPA. The independent assessor may also ask additional follow-up questions if required. The questions will address the KSBs identified for assessment within the professional discussion as identified in appendix 1. Questions will be in line with the expectation of a Level 4 apprenticeship.
- A 25-minute discussion around specific points that the independent assessor wishes to explore with the apprentice which apply to the KSBs for this assessment method: what they did, what they have learnt, results, what they would do differently etc.

The independent assessor must ensure that the professional discussion is conducted in a suitable environment free from distraction. It is anticipated that EPAOs will use the apprentice's employer's premises wherever possible to minimise costs. It may be conducted face to face or via an online platform e.g. video conferencing. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should an online option be used. The professional discussion will take place immediately after the presentation. However, as previously mentioned, this stage of end-point assessment will not take place if the apprentice has not first passed the work-based project.

Employer Support:

- Dedicated Senior Account Manager
- Quarterly Cohort Reviews with Senior Account Manager
- Employer Showcase in Swarm media and news
- Access to view Learners progress via our E-portfolio

Costs:

Full Apprenticeship Cost Per Learner: £6000 (Maximum Funding Band)

For more information please don't hesitate to contact us.

Email: enquires@swarmgroup.org.uk

Phone: 0800 0868199